HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Manitoba

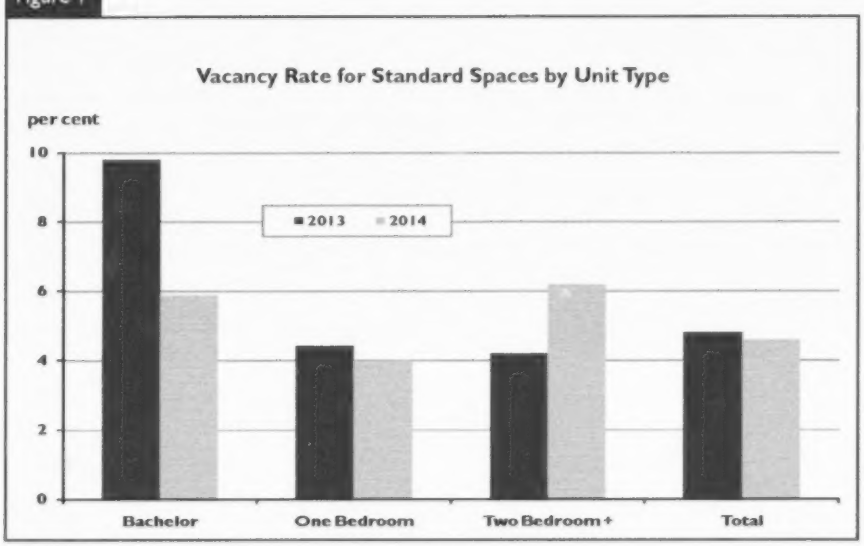
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2014

Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba stood at 4.6 per cent in 2014, compared to 4.8 per cent in 2013.
- The overall average rent for a standard retirement space in Manitoba was $2,447 in 2014, compared to $2,378 one year earlier.
- There were 35 facilities surveyed in Manitoba in 2014, containing a total of 3,882 spaces and housing 4,145 residents.

Figure 1



Source: CMHC

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MANITOBA VACANCY RATE OF STANDARD AND TOTAL (UNIVERSE) SPACES

Province Total
S: 4.6%
T: 4.3%

S: Standard Spaces
T: Total Spaces (Universe)

Total Number of Structures
1 - 5 6 - 30

0 25 50 km

Vacancy Rates

Overall vacancy rate edged upward

According to Canada Mortgage and Housing Corporation's (CMHC) 2014 Seniors' Housing Survey, the vacancy rate in standard spaces in seniors' rental residences in the province of Manitoba was 4.6 per cent in 2014, compared to 4.8 per cent in 2013. The seniors' survey targeted only private and non-profit retirement structures with at least 10 rental units and where the majority of residents are age 65 and over and have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry.

The vacancy rate is consistent with a moderate increase in the population of seniors in Manitoba in concert with a similar increase in the number of spaces. According to Statistics Canada, the population aged 75 and over increased 0.6 per cent in 2013 compared to 2012, lower than the overall population increase of 1.2 per cent. However, the growth rate increased to 1.5 per cent for the population above 85 years of age who, according to Census data, comprise over half the population in residences for seniors. Meanwhile, the number of spaces in the overall universe in 2014 increased by 88 spaces or 2.3 per cent.

Among the different bedroom types in Manitoba's seniors' rental residences, two-bedroom units saw the highest vacancy rate at 6.2 per cent in 2014, up from 4.2 per cent in 2013. This type of unit also saw its overall universe increase by 30 units since 2013 which contributed to the increase in vacancy rate. Bachelor spaces recorded the next highest vacancy rate at 5.9 per cent, although this was down from 9.8 per cent one year earlier. Vacancies in one-bedroom units also registered a decline, moving from 4.4 per cent in 2013 to 4.0 per cent in 2014. This was also the bedroom type with the lowest vacancy rate in 2014. Census data shows that almost 80 per cent of Manitobans living in seniors' residences live alone, helping to make one-bedroom units the most popular unit type.

Vacancy rate moved higher in lower rent ranges

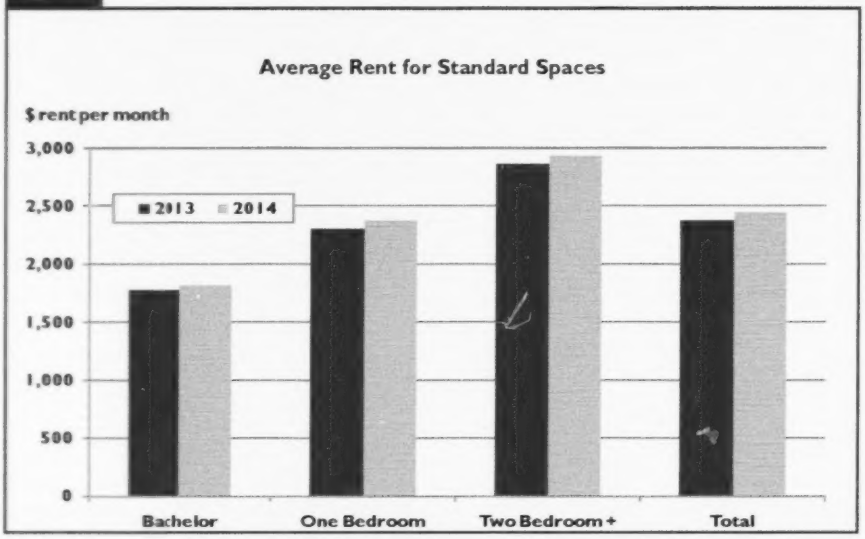
Across the province, vacancy rates were highest among spaces in both the upper and lower rent ranges. Spaces renting for more than $2,500 per month had a vacancy rate of 5.8 per cent in 2014, unchanged from where it stood in 2013. The vacancy rate for spaces renting for less than $1,500 per month was 5.8 per cent in 2014 compared to 3.6 per cent one year prior. Units in this rent range comprise the smallest share of all standard units, thus changes of only a few vacant units can create large changes to the vacancy rate. Spaces renting between $2,000 and $2,499 saw their vacancy rate move down from 4.9 per cent in 2013 to 4.3 per cent in 2014, slightly lower than the overall average for all unit types

Rents

Average monthly rents move higher

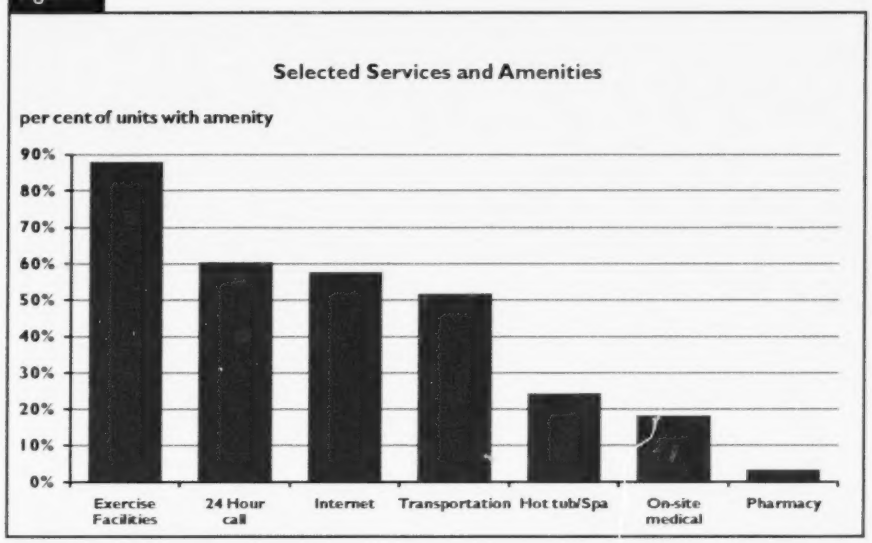
The average rent charged for seniors' Standard Spaces of all types on a province-wide basis was $2,447 per month in 2014, compared to $2,378 in 2013. The additional services and amenities provided to residents contribute to the higher rents in seniors' facilities compared to accommodations in the purpose-built rental market. Average Rents ranged from $1,815 for a bachelor suite to $2,934 for two-bedroom and larger units. The average rent for a one-bedroom space was $2,379 in the 2014 survey compared to a monthly average of $2,308 in 2013. In bachelor spaces, the average rent was $1,815 per month in 2014 compared to

Figure 2



Source: CMHC

Figure 3



Source: CMHC

$1,779 in 2013.

Reviewing the universe of spaces by rent range, the largest share of spaces, at 46.6 per cent, rented for more than $2,500 per month. This was up from a 43.3 per cent share one year earlier. The next largest share was comprised of spaces renting between $2,000 and $2,499 per month, which represented 37.0 per cent of the total universe, up from 31.4 per cent in the previous year. Only 4.8 per cent of all seniors' rental spaces in the province charged less than $1,500 per month in 2014

Services and amenities vary among structures

Only seniors' facilities offering an on-site meal plan qualify for the survey, and all facilities opted to include the meal plan as part of the rent. While many suites contained kitchenettes suitable for the preparation of a snack or light meal, 51.6 per cent of all structures in this year's survey reported the inclusion of two meals per day. This also represented a slightly higher proportion from 2013, when 50 per cent of structures offered this kind of plan. The share of structures providing three daily meals fell slightly from 47.1 per cent in 2013 to 45.3 per cent in 2014. Only 3.1 per cent of all structures reported a plan with one meal per day compared to 2.9 per cent being reported in the 2013 survey.

The most prevalent service was a 24-hour call bell, which was available in 60.4 per cent of all structures in the province in 2014. By comparison, this service was available in 61.8 per cent of all structures in 2013. On site medical services were available in 18.2 per cent of all structures in 2014, down from 23.5 per cent in 2013. Meanwhile 15.1 per cent of all structures had a registered nurse on-site in this year's survey, up from 14.7 per cent recorded in 2013. Other services on-site include pharmacies where 3.1 per cent of structures offered this service in 2014. In the previous year's survey, this proportion was 5.9 per cent.

Among amenities offered in structures, 88 per cent had access to an exercise facility in 2014, unchanged from one year earlier. As was the case in previous years, this was the most commonly available amenity offered to tenants. Internet access was the next most common amenity offered, with 57.8 per cent of all structures in the province offering this service, down from 64.7 per cent in 2013. This was followed by transportation services, which were available in 51.6 per cent of structures compared to 55.9 per cent in 2013. Other amenities provided include a spa or hot tub, found in 24.3 per cent of structures. With respect to ancillary services, cable television was included in the rent of 42.9 per cent of residences in 2014.

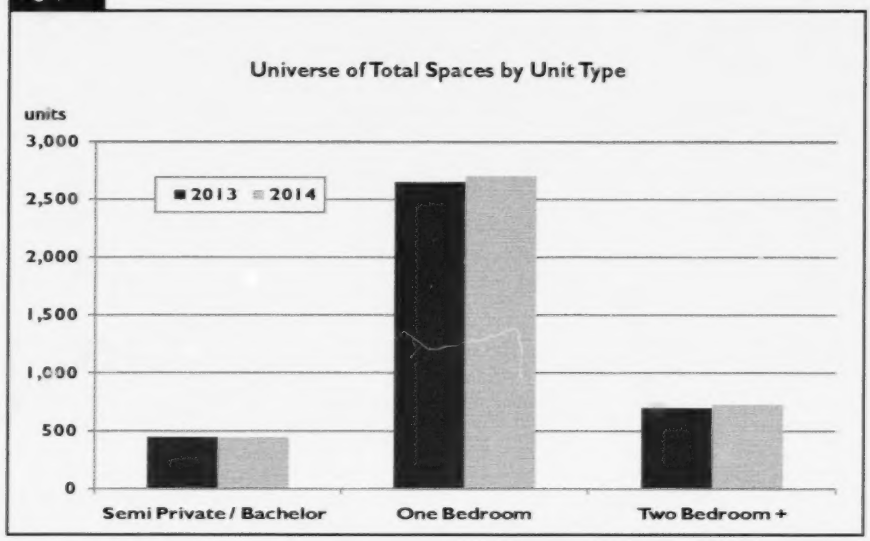
Universe

Survey coverage

The total number of seniors' residences surveyed across the province in 2014 was 35, one additional structure since 2013. As a result, there were 3,882 total spaces in the universe, 2.3 per cent more than in the 2013 survey. These housed 4,145 residents, which represents a capture rate equivalent to 4.7 per cent of Manitoba's estimated population over 75 years of age. This was lower than the national capture rate of 8.9 per cent. On this basis, we can conclude that the vast majority of seniors in Manitoba do not live in seniors' residences. Some seniors opting for independent living may be choosing to access home care services rather than move to a collective dwelling such as a seniors' residence, contributing to the lower capture rate.

The majority of spaces surveyed, at 69.8 per cent, were one bedroom spaces, followed by two bedroom spaces at 18.7 per cent. Semi-private and bachelor spaces made up the remaining 11.5 per cent. With the addition of a new building, the proportion of concrete frame structures in the universe increased from 24.2 per cent in 2013 to 28.6 in this year's survey.

Figure 4



Source: CMHC

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1.1 Vacancy Rate (%) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Manitoba	**	**	9.8	5.9	4.4	4.0	4.2	6.2	4.8	4.6

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rate (%) of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Manitoba	3.6	5.8	2.6	**	4.9	4.3	5.8	5.8	4.8	4.6

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Manitoba

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2013	2014				
Manitoba	3,882	4.5	4.3	35	4,145	88,100	4.7

[1] Source: Table 11-8, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Manitoba, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	**448**	**2,708**	**726**	**3,882**

2.2 Universe by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	**448**	**2,708**	**726**	**3,882**
Standard Spaces	255	2,596	694	3,545
Non-Standard Spaces	193	3	2	198
Unknown Spaces	-	109	30	139

2.3 Universe of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Manitoba	**4.8**	**11.6**	**37.0**	**46.6**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Manitoba

Province	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Manitoba	**0.0**	**3.1**	**51.6**	**45.3**	**18.2**	**15.1**	**60.4**	**3.1**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	4.2	**	**	24.9	20.7	70.7	4.2

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Manitoba

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Manitoba	**51.6**	**0.0**	**24.3**	**	**88.0**	**57.8**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	62.3	0.0	**	**	100.0	74.9

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
Manitoba	**	**	1,779	1,815	2,308	2,379	2,862	2,934	2,378	2,447

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

O1 Building Structure Makeup (%)
Manitoba

Province	Concrete Frame	Wood Frame
Manitoba	**28.6**	**71.4**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Manitoba

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Winnipeg CMA	Cable	43.3	36.7	20.0	**
	Telephone	3.3	76.7	20.0	**
Rest of Manitoba	Cable	40.0	60.0	**	**
	Telephone	**	100.0	**	**
Manitoba	**Cable**	**42.9**	**40.0**	**17.1**	**
	Telephone	**2.9**	**80.0**	**17.1**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Manitoba

Province	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	**	**	**4.0**	**4.6**

O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Manitoba

Province		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Bachelor	**	**	1,893	1,815
	One Bedroom	**	**	2,390	2,379
	Two Bedroom +	**	**	2,904	2,934
	All	**	**	2,480	2,447

The following letter codes are used to indicate the reliability of the estimates:
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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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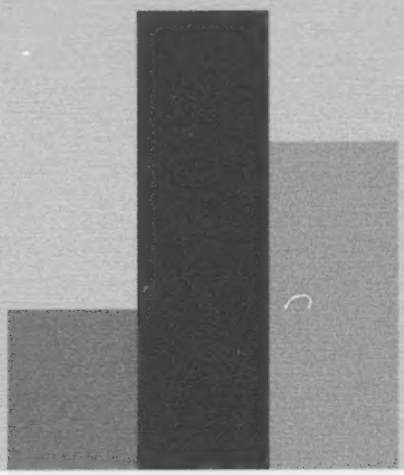

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